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# MARKETING & MEDIA Decisions

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# UPDATE

## Horse racing loses the horse race

That all-American sport, baseball, claimed the greatest spectator attendance last year (see chart at right), edging out horse racing, which had in the previous 31 consecutive years, commanded the greatest number of eyes, according to the 37th annual survey conducted by the *Daily Racing Form*. (See: *Steerike . . . what happened when the baseball strike hit,*" September 1981, pg. 64.)

The statistics show that last year baseball drew a total attendance of 78,051,343, up 3,220,141, over the previous year.

That advance moved baseball about a length ahead of horse racing, which had a draw of 75,784,430 fans last year, down 1,834,077 from 1982.

The decline in audience attendance is attributed to a drop in the number of thoroughbred races scheduled throughout last year.

Overall, professional sports events attendance was up last year for the 11 major sports as totals soared to past the 370 million mark.

National Football League attendance also gained last year, with no strike to curtail the season. Attendance climbed to 13,277,222, an increase of over five million.

The World Football League, in its first season, drew 2,680,961. Overall, including NCAA football attendance, the sport drew 54,417,705 through the turnstyles last year.

Marketers and advertisers may look at the attendance data from opposing points of view: on the one hand, the figures show that interest in sports is gaining.

But on the other hand, the more people who attend games, the fewer who are home to watch commercials in the broadcasts of those games.

| | *1983* | | *Difference 1983 & 1982* |
|---|---|---|---|
| **BASEBALL** | | | |
| Major Leagues, 26 Teams | 45,540,338 | PLUS | 952,464 |
| Minor Leagues, 17 Circuits | 18,560,690 | PLUS | 923,709 |
| World Series and Play-Offs | 1,053,818 | minus | 294,359 |
| Colleges | 12,896,497 | PLUS | 1,638,227 |
| Totals | 78,051,343 | PLUS | 3,220,041 |
| **RACING** | | | |
| Thoroughbreds | 50,169,430 | minus | 1,682,157 |
| †Harness | 25,615,000 | minus | 151,920 |
| Totals | 75,784,430 | minus | 1,834,077 |
| **FOOTBALL** | | | |
| Collegiate, 651 Schools | 36,301,877 | minus | 236,760 |
| National Football League, 28 Teams | 13,277,222 | PLUS | 5,909,784 |
| U.S. Football League, 12 Teams | 2,680,961 | First Season 1983 | |
| Post-Season Games, Colleges & Pros | 2,157,645 | minus | 299,210 |
| Totals | 54,417,705 | PLUS | 8,054,775 |
| **BASKETBALL ('82-'83 Season)** | | | |
| 1266 Senior Colleges | 31,471,135 | PLUS | 365,187 |
| N.B.A., 23 Teams, Including Play-Offs | 10,244,084 | minus | 472,220 |
| Totals | 41,715,219 | minus | 107,033 |
| **HOCKEY ('82-'83 Season)** | | | |
| National Hockey League, 21 Teams | 12,028,832 | PLUS | 258,990 |
| †Minors & Colleges | 8,256,882 | minus | 674,687 |
| Totals | 20,285,714 | minus | 415,697 |
| **GREYHOUND RACING** | 22,090,018 | PLUS | 592,030 |
| **†BOXING** | 7,144,747 | minus | 728,253 |
| **†WRESTLING** | 9,500,000 | PLUS | 2,315,100 |
| **†AUTOMOBILE RACING** | 55,122,329 | minus | 116,001 |
| **†SOCCER** | 8,400,348 | minus | 1,549,005 |
| **†TENNIS (Open)** | 4,200,000 | PLUS | 1,325,000 |

†Estimated, exact figures not available.

## BBDO votes for people meters

The problems with meters were aired recently in a BBDO "Point of View" paper, as well as the problems with diaries. (See: *Acid test for people meters*, April 1984, pg. 74.)

The BBDO position paper states, "All told, we believe meters, especially the people variety, have definite advantages over diaries. Simply put: they are machines and thus not subject to human frailties of memory loss, esteem bias, laziness; they allow for data collection on a continuous basis which has ramifications for new program assessment, schedule performance, the sweeps concept in spot tv and commercial audience measurement; they may prove cost efficient compared to current household meter/household diary combination. "We recognize that meters do not represent the perfect measurement technique.

"But on the negative side, meter measurement: may pick up set tuning when no one is there; depending on implementation, may be more expensive technology which could impact on the cost of commercial time if the networks and stations continue to pay the freight; in the short run, could result in viewing patterns different from those we have been used to seeing."

But the BBDO paper notes, "We are probably already at or beyond the range where people can accurately recall and record all they have viewed while new broadcast options continue to expand.

# FUTURES

## Wntd: mktg vp w/pckg gds. exper.

The demand for marketing executives which picked up steam during the recession, is still going strong. Several executive search firms expect that demand will further heighten, pointing to a changed perception of marketing's role within the corporation.

Gary Kaplan, a vice president in the West Coast office of Korn/Ferry, says that demand has been consistent for the past two years, which he finds surprising. Normally, he explains, when the economy worsens, corporations cut back on marketing funds, and on personnel. "It's been viewed as a disposable," he adds. Not so in 1982, when the firm was "loaded with marketing requests." Since then, the firm has been busy filling requests from consumer and industrial corporations, for top and middle management.

He attributes the sudden shift to a different view of marketing, one that took hold in the midst of the recession. Corporations that had not considered it a strength began looking to marketers as a Band-Aid cure, "a panacea," that would help boost sales. Kaplan points to the consumer electronics industry, which learned it needed product life cycle, positioning and differentiation strategies, and recruited marketers from packaged goods companies.

"Marketing has become a viable area to get well-grounded business training, and to go up the ladder in," he says. Even in consumer companies, where sales and marketing have always provided a high percentage of the leadership, Kaplan says he is seeing a further tilt toward marketing.

Kaplan stresses that the change reflects a corporate need for individuals with more balanced backgrounds, and perspectives on the shifting competitive society. Where a new marketing position might have been created to give a company an edge, he says, the concern is now for effectiveness. He points to the many requests for general managers who have a solid marketing background. Kaplan doesn't think the new emphasis will change the structure of the corporation: "Marketing people like to think that they're more broad minded, but they face the same pitfalls," he says.

Russell Reynolds, a New York-based international search firm, found that companies are turning to marketing executives for long-term planning in "an increasingly competitive marketplace," according to a recent survey of 1,000 industrial and service companies.

Requests for sales and marketing executives increased 30%, according to Roger C. Bullard, managing director of the firm, who adds that the survey results "confirm our own experience."

Among the chief executive officers surveyed, 24% said they planned to hire more sales and marketing executives within the next year, and 29% noted that they planned additions in this area over the next five years. The most significant aspect of the survey, according to Bullard, was that the demand was not exclusively for sales and marketing departments: companies want chief executive officers, presidents, and other corporate executives with sales and marketing backgrounds.

This was also the conclusion of a study released by Heidrick and Struggles, the Chicago-based international search firm. The survey, conducted among 1,000 chief executives, compared their backgrounds with respondents of the 1980 survey, and found that the percent with a sales marketing background had risen from 28.4% to 31.2%.

The survey queried chief executive officers on their work conditions (hours, compensation, marital status, and corporate background), and on their perceptions of the future. Among the measures cited to improve Ameri-

### *Route to the Top*

| | *All Companies* | *All Industrials* | *Industrials by Size* | | | *All Non-Industrials* |
|---|---|---|---|---|---|---|
| | | | $2 bil or more | $1-1.9 bil | $999 mm or less | |
| **Sales/Marketing** | 31.2% | 28.6% | 31.1% | 33.4% | 23.8% | 34.1% |
| **Finance/Accounting** | 25.4 | 20.1 | 20.7 | 24.2 | 17.5 | 31.2 |
| **Manufacturing/Operations** | 21.2 | 31.2 | 29.3 | 27.3 | 34.9 | 10.1 |
| **Engineering/Research** | 11.6 | 14.3 | 12.1 | 12.1 | 17.5 | 8.7 |
| **Legal** | 8.2 | 4.0 | 1.7 | 3.0 | 6.3 | 13.0 |
| **All Other** | 2.4 | 1.8 | 5.1 | — | — | 2.9 |
| | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

**Heidrick and Struggles, the search firm, found that more executives than ever come from a marketing/sales background.**

can competitiveness, productivity was the most frequently mentioned problem, and developing more competent management, the second.

John Bassler, an associate with the firm, explains that dependence on marketing is "largely a function of the economy." He says that assignments to find marketing executives have increased in the past two years: "As the economy improves, senior executives see more opportunities to grow business through marketing." He does not feel that there has been a change in the perception of marketing, except in the home computer industry.

Bassler explains the popularity of marketing mavens for senior positions by pointing to the resurgence of the economy in the past year, adding that advertising expenditures have also boomed. (Total advertising expenditures are expected to increase 13% this year, to $84.6 billion, according to Doyle Dane Bernbach's Media Trends.)

Should demand for marketing executives persist, he concludes, "the marketing person will have to become more knowledgeable about finances, sales and possibly distribution."

## How to get ahead by looking good

So you bought *Dress for Success* and nothing happened? You invested in a shelf-full of clothes-conscious books and got nothing but a headache from them? Maybe you should consider an image consultant.

The image consulting industry has been growing by leaps and bounds, from 36 firms listed in the 1978 directory, to 256 in 1984, according to Editorial Services Co., the New York-based firm that publishes the annual directory.

The directory divides the $102 million industry into two sections: speech/public appearance consultants and dress/image advisors. Speech training companies are by far the most lucrative, with combined 1983 revenues of $88 million since they cater to corporate clients rather then individuals. Most are concentrated on the East Coast (40% in the Northeast, 14% in the Southeast).

The clientele tends to come from companies (26% from large to medium corporations, 14% from small companies). Only 10% are looking for a job, 8% are politicians, and 5% broadcasters. Dress/color trainers appeal more strongly to women (90%), about half of whom work in corporations (23% in large to medium, 21% in small companies). This industry, dominated by women (89% of owners are women), is concentrated in the Northeast (22%) and Midwest (28%).

Jacqueline Thompson, who compiled the study, explains that the shift to a services economy means that more people need social skills for which they have no role model.

"It's also a function of the Baby Boom generation. There aren't enough jobs to go around, and everyone is searching for a little edge." The motivations vary, she says, citing as a typical candidate for image consulting an accountant from a lower-middle-class background who may not have been exposed to corporate dress habits.

"For women, there are time reasons for getting a dress consultant. They are executives and they have families, and they may simply not have the time to do their own shopping."

Fees range from $60 or less for a personal shopper, to $10,000 for a complete corporate speech training program.

**Target the maturity market through the local publications which serve them best . . .**

- More than 60 local and regional newspapers and magazines
- Total circulation available of more than two million copies
- Select markets, publications to meet your marketing need — no added premium
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|---|---|---|
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"Of the 64 publications surveyed by Mendlesohn, the top four delivering the most affluent readers per copy are *Town & Country, Architectural Digest, Financial World* – and HBR."

Harvard Business Review

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them beyond mere vehicle exposure for years. In 1961, the Advertising Research Foundation detailed the concept of various communication stages from vehicle distribution, to sales response. As recently as last month, Timothy Joyce of MRI in his excellent report on "Page Exposures" reaffirms Paul Chooks' (chairman of the board of the ARF) 1983 statement that our focus today remains on stage two — vehicle exposure. You don't need research to know that an ad in *USA Today* has a meaningful advantage in stage three — ad exposure.

You can't even, when casually flipping pages, miss a four-color unit in this paper.

*USA Today* is extremely confident when advertisers run coupons or 800 number response requests. I know why. ■

---

**MAGAZINES**
**By DEBORAH SOLOMON**
Supervisor, media research,
Leo Burnett, Chicago.

## Foreign circulation

Many U.S. magazines are sold in other countries. In some cases, this foreign circulation amounts to a substantial number of copies. However, many products are not distributed outside of the U.S.

Consequently, in developing a magazine plan, it might be helpful to take foreign circulation into account.

We studied the Audit Bureau of Circulations (ABC) Publishers Statements (pink sheets) for 108 major consumer magazines and found that 12 publications or 11% had foreign circulation that accounted for more than 10% of their total circulation. This "foreign circulation" which includes civilian and military personnel overseas as well as Canada and other countries, is important to know because it is included in the rate bases of many magazines.

The following chart shows the 12 magazines with total circulation consisting of 10% or more foreign circulation. Eight of these magazines include foreign circulation in their rate bases. In most cases, this circulation is primarily Canadian.

### Magazines with over 10% foreign circulation

| Magazine | Foreign Circ. | % of Total Circ. | Foreign Circ. included in rate base? |
|---|---|---|---|
| National Geographic | 2,013,018 | 18.9% | U.S. edition available |
| Penthouse | 585,339 | 15.8 | Yes |
| Fortune | 108,390 | 15.5 | N. American edition includes Canada |
| Gourmet | 86,057 | 13.3 | Yes |
| Omni | 104,542 | 12.9 | Yes |
| Modern Bride | 39,714 | 11.7 | no set rate base |
| Vogue | 152,252 | 11.5 | No |
| Science Digest | 68,259 | 11.5 | Yes |
| National Lampoon | 52,295 | 11.3 | Yes |
| Discover | 101,556 | 10.8 | Yes |
| Life | 166,970 | 10.8 | Yes |
| Road & Track | 79,302 | 10.6 | Yes |

*Source:* ABC Publishers Statements for 6 months ending December 31, 1983.

Another way to look at foreign circulation is to look at the number of copies sold outside the U.S. Of the 108 magazines examined, 15 had foreign circulation in excess of 150,000 copies. The total circulation of most of these publications, however, was so large that foreign circulation accounted for only a small percent of the total. All but three of these publications (*National Geographic, The Star* and *Vogue*), include foreign circulation in their rate bases.

It should be noted that many of these magazines do not need the foreign circulation to meet rate base. For example, *Cosmopolitan*'s average circulation for six months ending December 31, 1983 was 3,038,400 on a rate base of 2,350,000. The average circulation bonus of 688,400 was greater than the foreign circulation of 230,474 (which was based on the August 1983 issue). This held true for all issues of *Cosmopolitan* during the period.

This study showed that it is important to remain aware of how much circulation a magazine has outside the U.S. and if that figure is used to establish the rate base.

A high amount or percentage of foreign circulation does not automatically mean a given magazine is inefficient. It is a criteria, however, which should be noted. ■

## Magazines with over 15,000 foreign circulation

| Magazine | Foreign Circ. | % of Total Circ. | Foreign Circ. included in rate base? |
|---|---|---|---|
| National Geographic | 2,013,018 | 18.9% | U.S. Edition Available |
| Penthouse | 585,339 | 15.8 | Yes |
| Playboy | 505,302 | 9.9 | Yes |
| National Enquirer | 459,773 | 9.1 | Yes |
| Family Circle | 409,392 | 4.9 | Yes |
| Woman's Day | 370,473 | 4.5 | Yes |
| Good Housekeeping | 352,938 | 6.1 | Yes |
| The Star | 317,685 | 7.6 | No |
| Cosmopolitan | 230,474 | 7.2 | Yes |
| Life | 166,970 | 10.8 | Yes |
| Glamour | 164,136 | 6.5 | Yes |
| People | 161,879 | 5.9 | Yes |
| Reader's Digest | 155,393 | 0.9 | Yes |
| Popular Science | 154,027 | 8.2 | Yes |
| Vogue | 152,252 | 11.5 | No |

*Source:* ABC Publishers Statement for 6 months ending December 31, 1983.


**Test market for food? Springfield is No. 1 in sales per household among "The Big 7" New England metros!**

*The Survey of Buying Power, 1983.*

**Right! The Springfield Newspapers reach 84% of the metro market!**

*Morning Union. Daily News. Sunday Republican.*

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- No significant infiltration by out-of-town newspapers.
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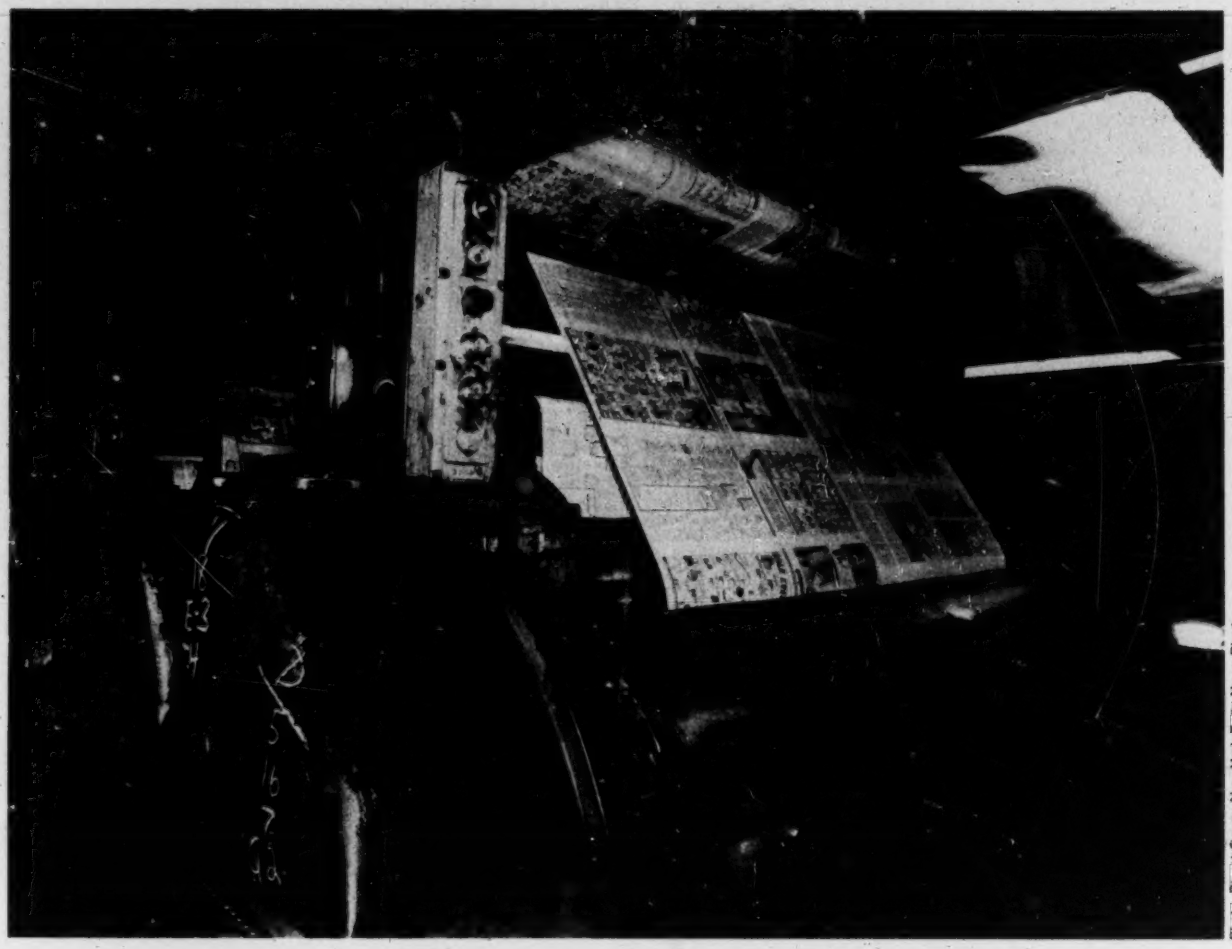


Photo: Stuart Gross; New York Daily News Plant

# 1983 brand leaders in newspapers

A few large national advertisers dominated national newspaper space in 1983, although some use was made of the medium by a long list of advertisers. And the growing use of co-op coupon units attracted new users into the papers. Biggest users continued to be cigarette, airline, automotive and food advertisers. This is the first and exclusive publication of new Media Records compilations of use of national newspaper advertising in 1983.

## 1983 brand leaders in newspapers

National advertisers treated newspapers very well in 1983, according to the Newspaper Advertising Bureau. Newspapers received a record volume of advertising, running 11.6% ahead of the 1982 tally.

Last year, the total climbed to $2,734,000,000, as compared to $2,450,000,000. A backward glance shows the yearly total increasing steadily, from figures of $1,963,000,000 in 1980, and $2,265,000,000 in 1981.

Category leadership continued in the hands of automotive manufacturers ($326,322,000), followed at a distance by cigarette marketers ($251,932,000), and airlines (247,747,000). Automotive advertisers increased their newspaper spending as 1983 closed on an upbeat sales note for the troubled industry. The increase, however, is less than one percent.

Cigarette advertisers took off in the opposite direction reducing national space use by 19.7% in dollar figures. RJR's Salem brand accounted for one third of that drop with a sharply diminished buy of newsprint, while a decline in new product introductions also took its toll. Cigarette marketers' use of newspapers has fallen 18.1% in 1982 from the previous year.

Airlines, overall, posted a 3.5% gain on the basis of a mixed performance. Domestic advertising was down 6.6%, but was offset by international carriers, who invested an additional 24% over their 1982 total. Newspaper use declined by cargo carriers 18% on a small base.

Among the other categories, some new trends emerged. Office equipment advertisers more than doubled the $40 million they invested in newspapers in 1982, to post a 138% increase on a $96.5 million expenditure. Part of that increase was contributed by computer manufacturers. The expenditure of leading makers and importers is included for the first time as a category in this report.

In the smaller travel categories, bus lines, steamship lines and railroads all advertised more in newspapers. Steamship lines invested another 20.5% to run up a total of $76,681,000 for ocean-going voyages, and bus lines invested $10,817,000 to lure more people into highway travel.

Television and radio stations didn't spend as much last year to encourage people to stop, look and listen, as that category total dropped 8.2% to $140,985,000. The total had gone up 15.8% the year before.

Household appliance marketers, experiencing a turnaround year, pushed their newspaper investment up by 28.6%. Refrigerator and dishwasher advertising soared by 457% to $2,475,000. Less than half a million had been spent the year before. High fidelity and component manufacturers took increased advantage of newspapers with a 24.3% increase and a total of $29,051,000.

Ironically, in a year in which direct marketing turned in a strong performance, newspaper use was down 8.7%, from $70,607,000 to $64,464,000.

The data that follow is published exclusively by *Marketing & Media Decisions* under an arrangement with Media Records. What we show, however, is just the tip of the iceberg — activity among the leaders and the summaries of expenditures by classifications and by the leading 100 corporate spenders in national newspaper space.

The full report is available from Media Records, 370 Seventh Avenue, New York NY 10001, for $1,050. Product classification reports range from a high of $305 for a complete class breakout (food for example) to $110 for a food sub-class.

The record is presented in four parts in one volume: classification totals; 100

## Newspapers' automotive dollars 1983: Where they come from

| Rank | Brand | 1983 Newspaper investment | Total (100%) Truck pick-ups campers | Total (100%) Auto | Percent of auto total (100%) Factory | Percent of auto total (100%) From dealer assn. | Percent of auto total (100%) Local dealer |
|---|---|---|---|---|---|---|---|
| 1. | Ford | $31,714,000 | 9% | 91% | 33% | 20% | 47% |
| 2. | Chevrolet | 23,472,000 | 7 | 93 | 12 | 7 | 81 |
| 3. | Cadillac | 22,780,000 | — | 100 | 7 | 6 | 87 |
| 4. | Dodge | 16,985,000 | 16 | 84 | 20 | 6 | 84 |
| 5. | Chrysler | 14,168,000 | — | 100 | 31 | 4 | 65 |
| | Top 5# | | | | | | |
| 6. | Toyota | 12,571,000 | 12 | 88 | 18 | 4 | 78 |
| 7. | Oldsmobile | 12,167,000 | — | 100 | 10 | 15 | 75 |
| 8. | Buick | 10,036,000 | 1 | 99 | 16 | 13 | 71 |
| 9. | Datsun | 9,276,000 | 35 | 65 | 20 | 11 | 69 |
| 10. | Honda | 6,891,000 | — | 100 | 32 | 5 | 63 |
| | Top 10# | | | | | | |
| 11. | Lincoln | 9,109,000 | — | 100 | 11 | 27 | 62 |
| 12. | Mercury | 6,692,000 | — | 100 | 37 | 39 | 24 |
| 13. | Mercedes-Benz | 6,586,000 | — | 100 | 54 | 1 | 45 |
| 14. | Pontiac | 6,062,000 | — | 100 | 18 | 7 | 75 |
| 15. | Jaguar | 5,885,000 | — | 100 | 48 | 12 | 40 |
| | Top 15# | | | | | | |
| 16. | Volkswagen | 5,702,000 | 1 | 99 | 46 | 28 | 26 |
| 17. | American | 4,955,000 | 5 | 95 | 23 | 35 | 42 |
| 18. | BMW | 4,761,000 | — | 100 | 39 | 28 | 33 |
| 19. | Porsche/Audi | 3,934,000 | — | 100 | 48 | 32 | 20 |
| 20. | Saab | 3,829,000 | — | 100 | 77 | 5 | 18 |
| | Top 20# | | | | | | |
| 21. | Volvo | 3,767,000 | — | 100 | 60 | 6 | 34 |
| 22. | Subaru | 2,689,000 | — | 100 | 16 | 8 | 76 |
| 23. | Renault | 2,643,000 | — | 100 | 10 | 34 | 56 |
| 24. | Mitsubishi | 2,383,000 | 4 | 96 | 23 | 26 | 51 |
| 25. | Mazda | 1,971,000 | 59 | 41 | 31 | 6 | 63 |
| | Top 25# | | | | | | |

Source: Media Records

leaders with corporate totals; 100 leading companies with brand breakouts; and individual brand breakouts within classifications.

### Automobiles

Ford again parks itself at the top spot among the automotive manufacturers with $31.7 million. This figure includes passenger car factory dollars, dealer associations, local dealers, plus trucks, vans, campers. Taking out trucks, et al. (9%), the total drops to $29 million (91%) for automobiles alone.

In the overall count, Chevrolet measures in at second place with $23.5 million, with Cadillac fitting into the third spot.

But take out the 7% Chevrolet allotted to trucks and rec vehicles, and Cadillac takes over the number two automobile spot, confirming the comeback of full-size cars. In dollars, it is $22.8 million for Caddy and $22 million for Chevy.

Ford's automobile (passenger car) dollars originate as follows: Factory — 33%; dealer associations — 20%, and local dealers — 47%. Both Cadillac and Chevy generate the bulk of their passenger car dollars from local dealers. The accompanying table shows this distribution for the top 25 makes.

The five-year trend shown in the table of the three leaders presents a varying pattern for Ford, an upward trend for Cadillac since 1979, and an up/down line for Chevrolet. Over the long haul, all three are up.

Whether total automotive spending or passenger cars alone, six of the top 10 are up for 1983; four are down. In the second 10, the pattern changes — nine advanced and one (Volkswagen) cut back.

Two of the top 25 entries in 1982 failed to make the list this year. The dropouts were Peugeot and Fiat. Taking their place were Mitsubishi, up from $600,000 to $2.4 million, and Mazda with a slight dip to $1.97 million.

### Cigarettes

As a class, cigarettes are still the second leading investor in national newspaper space.

And the 1983 leaders are newcomers to the cigarette display case in the continuing effort to erode share points, or even fractional points, from each other. The industry claims that their advertising is designed to make a smoker switch brands — not generate new smokers.

The leading brand in national newspaper advertising in 1983 was Philip Morris's one-year-old Player's brand. Reynolds took the next five places (in order of newspaper ad volume) with: Bright (its second year), Century (another first-timer), Camel, More and Winston. Brown & Williamson showed up with Barclay, in the number seven spot. Marlboro (Philip Morris) was eighth, Kool (B&W) was ninth and Vantage, another Reynolds entry, took the tenth slot.

The leader, Player's, with no comparative 1982 experience, invested $23.9 million compared with almost $31 million for the 1982 leader, Salem. Reynolds' Bright, second ranked with $22 million, was up from $10.2 million in 1982. Century was supported with $14.5 million in newspaper ad dollars.

Camel, at $13.8 million in 1983 (up from $11.3 million in 1982) reversed its emphasis. Most of the brand's identifiable dollars went to the regular product — $8 million against $5.7 million. In 1982 Lights received $7.7 million against $3.4 million for regulars.

Salem, first in 1982 with $31 million in ad expenditures, dropped to 11th place with $9.7 million. Winston, its geographical companion from Reynolds, dropped from fourth to sixth with $12.1 million against $19.6 million.

American Tobacco brands were conspicuous because of their absence. Only Lucky Strike ($2.2 million), and Carlton (under $1 million), showed activity. The famous old-timers — Pall Mall and Tareyton — remain unsupported in newspapers.

### Airlines

The big three in newspaper advertising among the airlines were Delta ($31.8 million, up from $24.7 million), Eastern ($22.5 million, up from $21.6 million) and TWA ($21.9 million, up from $19.8 million).

The relative gains, in the same order, were: 28.7%, 4.2%, 10.6% — a wide variance.

TWA, in the number three spot, traded places with Pan Am, now fourth. The Pan Am newspaper investment surged in both 1981 and 1982 but dropped to $19 million in 1983 from $23.6 million in 1982, a decrease of 19.5%. The remainder of the top 10 lined up in this order: American, Republic, Continental Northwest Orient, U.S. Air, United.

In its search for international traffic, Delta allotted 16% of its total to reach overseas-inclined travelers. Eastern assigned 35% of its total to this end; in a reversal of last year's proportions, TWA spent 60% of its total in this direction. In 1982 the split was 65%-35%.

The foreign carriers entered the ranking at the 15th spot, spending (in rounded numbers) from a little over $3 million (British Airways) to a little over a million for the smallest investor.

Among the cargo carriers, Emery (at $1.3 million) led, followed by Federal Express, at $896,000 and United Parcel Service with $160,000.

### Computers

Computers figured in as an exciting source of new national newspaper ad dollars. The 1983 total was $65.2 million, of which 92.5% was invested by 17 brands that spent more than half a million dollars. Their total was $60.3 million, more than four times as much as in 1982. The top spender was Texas Instruments with $16.7 million, up from $3.2 million in 1982. IBM tallied

**Top 20 cigarette brands expenditures in newspapers — 1983**

| Rank | Brand | Newspaper investment |
|---|---|---|
| 1. | Player's | $ 23,945,000 |
| 2. | Bright | 21,980,000 |
| 3. | Century | 14,472,000 |
| 4. | Camel | 13,801,000 |
| 5. | More | 13,536,000 |
| | **Top 5** | **$ 87,734,000** |
| 6. | Winston | $ 12,108,000 |
| 7. | Barclay | 11,720,000 |
| 8. | Marlboro | 11,062,000 |
| 9. | Kool | 11,031,000 |
| 10. | Vantage | 10,953,000 |
| | **Top 10** | **$144,608,000** |
| 11. | Salem | $ 9,731,000 |
| 12. | Merit | 9,286,000 |
| 13. | Satin | 8,836,000 |
| 14. | Kent | 8,508,000 |
| 15. | Now | 8,415,000 |
| | **Top 15** | **$189,384,000** |
| 16. | Benson & Hedges | $ 8,127,000 |
| 17. | Virginia Slims | 4,241,000 |
| 18. | True | 3,838,000 |
| 19. | Richland | 2,222,000 |
| 20. | Lucky Strike | 2,208,000 |
| | **Top 20** | **$210,020,000** |
| | **All other** | **$ 41,912,000** |
| | **Total** | **$251,932,000** |

$7.3 million, up from $4.9 million. Third spot went to Epson with $6.3 million, up from almost nothing ($72,000) in 1982.

### Foods

Media Records shows detailed data for 22 sub-classes in the food category, which is the third ranked in newspapers after the usual leaders, transportation and tobacco.

Excluding beverages (tea, coffee, soft drinks), the leading food categories are cereals, condiments, confectionery and snacks, dairy products, fruits and vegetables, prepared dishes, shortening/oils/margarine. Here is a quick rundown of the 1983 newspaper activity among the leaders:

**Bakery products:** Nabisco and Pepperidge Farm again placed one/two in the rankings, followed by Arnold products which took over the third spot from Sunshine.

Nabisco with a 13% increase, reached $3.3 million. Pepperidge Farm came in at $751,000, down 30% from its 1982 outlay.

Arnolds, in its move into third, more than doubled its investment over 1982 reaching $541,000. Sunshine, at $338,000, spent about half its 1982 investment.

**Cereals:** Kellogg's continues to dominate this category with its ever-changing list of cereals. Its 1983 newspaper outlay of $2.4 million was up 17% over 1982. General Mills' $1.7 million was a tremendous increase over 1982's $420,000. Heavy emphasis was placed against Cheerios and Wheaties (almost a million dollars against nothing identifiable in 1982). Post cereals, at $296,000, was down one-third from 1982. Its pattern over the past five years has been up and down — mostly down.

**Condiments:** Only Hunt's remains of 1982's top three. It was joined by Prego (the leader) and Heinz (number three). Prego's $1.3 million was up from $155,000 in 1982. Hunt's, at $1,134,000, was down 4.7% from the previous year. Heinz, at $904,000, has shown consecutive increases since 1980 and is closing in on the million mark, last hit in 1979.

**Confectionery/snacks:** The three leaders in 1983 showed increased use of newspapers. M&M/Mars is down from its peak of $2.5 million in 1980, but is back in the million class ($1,077,000). In 1982 the outlay was $700,000; in 1981 only $194,000 was invested. Hershey with $1,066,000 is a close second and has been touching around the million mark for the past three years. Mauna Loa nuts has showed consecutive increases since it was first reported in 1980 at $43,000. Last year it reached $470,000.

**Dairy products:** Kraft is again the leader in 1983 with an investment of $1,125,000, down 39% from its recent peak of $1.8 million in 1982. Sealtest, with an increase of 120% to $1,086,000, took over second place from American Dairy Association in 1982. Coffee Mate is the third member of this group with $657,000, reversing a decrease reported for 1982.

**Fruits and vegetables:** Ore-Ida potatoes is again the top spender but cut its 1982 outlay by half for a total of $421,000. This action reversed an upward trend evidenced in recent years. California Avocado Commission came in a close second at $402,000, almost doubling its 1982 expenditure. Birds Eye vegetables made the third spot despite a decrease of $12,000 to $313,000.

**Meats-fish-poultry:** Hormel, again tops in this group, continued its upward interest in newspapers with a 34% increase to $4,299,000. Keeping it company in the second spot, Banquet increased its investment to $1,440,000 from 354,000 in 1982. Wilson is still among the million-dollar investors ($1,092,000) but is down from $1,345,000 in 1982. Perdue and Swift, both million-dollar spenders in 1982, dropped well below this mark in 1983.

**Prepared dishes:** In the area of prepared foods, there was a complete change of names in the top spots. Now holding forth as the 1983 leader is Jeno's frozen products with a four-fold increase to $508,000. Buitoni frozen products ranked second with $300,000, up from practically nothing in the previous two years. On-Cor Frozen Entrees took third spot, tripling its 1982 outlay to reach $299,000.

**Shortenings-oils-margarines:** Imperial products moved into the top spot with a 17% increase to $560,000. Following behind are Mazola products, up 67% to $457,000. Wesson Oil remains in third position despite a 24% cut to $332,000.

### Soft drinks

Pepsi-Cola, more than doubling its 1982 expenditure, took top spot with $5,198,000. Coca-Cola, last year's leader, showed a 68% increase, giving it second place with $4,267,000. Seven-Up moved back into the million-dollar class ($1,760,000), up from $684,000 in 1982.

### Lotteries

Michigan, New York and Massachusetts are the top contributors to newspaper ad volume in 1983 among lottery sponsors. However, each cut its outlay from 1982. Michigan's $1,081,000 was off 25%; New York's $793,000 was off 14%, and Massachusetts' $437,000 was off 6%.

### Couponers

With Vlasic in the lead and Blair not too far behind, co-op couponing (free-standing inserts) took off in 1983. The average investment of these two in 1982 was $37,000,000; in 1983 it rose to $59,000,000. The third major factor, Newspaper Co-op Couponing, was down 11% to $36,230,000.

Incidentally, the money invested by the individual participants is not included in the individual company/brand totals. However, money spent in the national and local supplements is allocated advertiser by advertiser.

### Mail order

Big dollars emanate from the direct response advertisers in newspapers — particularly among the leaders. Franklin Mint again led with $8,340,000 down slightly from 1982. Shopping Mart at $5,253,000 was up 57% and Spencer Gifts' $4,118,000 was up 10%.

### Magazines

*TV Guide* more than tripled its outlay for newspaper advertising, rising to $4,362,000. *Time*, last year's leader, was off 20% to $1,803,000. In third place was *People* magazine, off 16% to $921,000.

### Radio/tv stations

ABC continued its long-time commitment to newspapers with an investment of $10.2 million, off slightly from 1982. The cuts by the other two network operations were more dramatic. NBC's $7.8 million was off 31%; CBS, with $8.4 million, was off 20%. ■

# 1983's top 100 newspaper advertisers; Here's what they spent.

| Rank | 1982 Investments | 1983 Investments |
|---|---|---|
| 1. Reynolds, R. J., Industries, Inc. | $123,175,000 | $112,343,000 |
| 2. General Motors Corp. | 86,965,000 | 88,579,000 |
| 3. AT&T | 34,467,000 | 71,995,000 |
| 4. Morris, Philip, Inc. | 83,794,000 | 65,272,000 |
| 5. Ford Motor Co. | 45,583,000 | 49,603,000 |
| 6. Chrysler Corp. | 29,597,000 | 31,846,000 |
| 7. Delta Airlines, Inc. | 24,665,000 | 31,810,000 |
| 8. RCA Corp. | 28,273,000 | 31,716,000 |
| 9. British American Tobacco Ltd. | 42,894,000 | 27,803,000 |
| 10. Loews Corp. | 22,645,000 | 22,533,000 |
| 11. Eastern Airlines, Inc. | 21,625,000 | 22,461,000 |
| 12. Trans World Corp. | 19,857,000 | 21,925,000 |
| 13. Pan American World Airways Inc. | 24,078,000 | 19,202,000 |
| 14. Texas Instruments Inc. | 3,319,000 | 16,872,000 |
| 15. CBS Inc. | 15,918,000 | 15,829,000 |
| 16. Warner Communications Inc. | 18,876,000 | 15,718,000 |
| 17. Xerox Corp. | 5,779,000 | 13,824,000 |
| 18. American Airlines, Inc. | 18,813,000 | 12,790,000 |
| 19. Toyota Motor Sales Co., Ltd. | 15,611,000 | 12,571,000 |
| 20. GTE Corp. | 1,621,000 | 12,414,000 |
| 21. Texas Air Corp. | 10,575,000 | 12,390,000 |
| 22. American Express Co. | 11,840,000 | 12,337,000 |
| 23. General Electric Co. | 6,054,000 | 12,220,000 |
| 24. International Business Machines Corp. | 9,488,000 | 11,720,000 |
| 25. Republic Airlines Inc. | 9,585,000 | 11,660,000 |
| 26. Sony Corp. Of America | 5,041,000 | 11,620,000 |
| 27. Esmark, Inc. | 1,864,000 | 11,550,000 |
| 28. U.S. Government | 9,634,000 | 11,548,000 |
| 29. Time Inc. | 20,187,000 | 11,428,000 |
| 30. American Broadcasting Companies Inc. | 10,299,000 | 10,304,000 |
| 31. Volkswagen of America, Inc. | 16,025,000 | 9,947,000 |
| 32. Procter & Gamble Co., The | 8,539,000 | 9,830,000 |
| 33. Nissan Motor Corp., U.S.A. | 9,743,000 | 9,444,000 |
| 34. Northwest Orient Airlines | 8,494,000 | 9,147,000 |
| 35. Greyhound Corporation, The | 2,888,000 | 8,926,000 |
| 36. Digital Equipment Corp. | 1,239,000 | 8,837,000 |
| 37. Seiko Corp. of America | 1,299,000 | 8,733,000 |
| 38. Seagram, Joseph E., & Sons, Inc. | 9,851,000 | 8,477,000 |
| 39. American Motors Corp. | 6,059,000 | 8,315,000 |
| 40. Honda Motor Co., Ltd. | 6,957,000 | 8,059,000 |
| 41. Holland American Cruises | 7,831,000 | 7,929,000 |
| 42. Cunard/NAC | 5,232,000 | 7,469,000 |
| 43. Sitmar Cruises | 5,994,000 | 7,403,000 |
| 44. Carnival Cruise Lines | 4,227,000 | 7,191,000 |
| 45. Dart & Kraft, Inc. | 6,976,000 | 7,067,000 |
| 46. Mobil Corp. | 8,046,000 | 7,045,000 |
| 47. USAIR | 8,085,000 | 6,720,000 |
| 48. Mercedes-Benz of North America, Inc. | 3,843,000 | 6,595,000 |
| 49. Nabisco Brands, Inc. | 6,225,000 | 6,174,000 |
| 50. Coca-Cola Company, The | 4,425,000 | 6,037,000 |
| 51. PepsiCo, Inc. | $ 2,853,000 | $ 6,002,000 |
| 52. British Leyland Motors, Inc. | 4,686,000 | 5,895,000 |
| 53. American Brands Inc. | 8,903,000 | 5,815,000 |
| 54. Beatrice Foods | 5,869,000 | 5,683,000 |
| 55. General Mills, Inc. | 4,242,000 | 5,621,000 |
| 56. Pleasant Hawaiian Holidays | 2,334,000 | 5,572,000 |
| 57. UAL Inc. | 5,997,000 | 5,432,000 |
| 58. United Steamship Co., The | 931,000 | 5,426,000 |
| 59. Liberty Travel Inc. | 3,853,000 | 5,361,000 |
| 60. General Tire & Rubber Co., The | 1,829,000 | 5,327,000 |
| 61. Apple Computers Inc. | 2,235,000 | 5,231,000 |
| 62. MCA Inc. | 4,594,000 | 5,165,000 |
| 63. Eastman Kodak Co. | 3,826,000 | 5,163,000 |
| 64. Western Airlines, Inc. | 4,693,000 | 4,980,000 |
| 65. Southwest Airlines Co. | 2,001,000 | 4,878,000 |
| 66. Horn & Hardart Co., The | 5,977,000 | 4,816,000 |
| 67. Bavarian Motor Works | 5,578,000 | 4,761,000 |
| 68. Norwegian Caribbean Lines | 3,953,000 | 4,715,000 |
| 69. Nelson Doubleday, Inc. | 3,907,000 | 4,658,000 |
| 70. Texaco Inc. | 1,621,000 | 4,693,000 |
| 71. Unilever U.S. | 5,337,000 | 4,689,000 |
| 72. United Technologies Corp. | 4,617,000 | 4,669,000 |
| 73. Campbell Soup Co. | 3,322,000 | 4,641,000 |
| 74. Royal Caribbean Cruise Line, Inc. | 2,600,000 | 4,580,000 |
| 75. Frost Co. | 3,209,000 | 4,516,000 |
| 76. Triangle Publications, Inc. | 1,517,000 | 4,505,000 |
| 77. Carefree David Vacations | 1,680,000 | 4,481,000 |
| 78. Rapid-American Corp. | 4,150,000 | 4,427,000 |
| 79. Hormel, Geo. A., & Co. | 3,241,000 | 4,389,000 |
| 80. Grandmet USA, Inc. (Liggett Group-1982) | 4,278,000 | 4,375,000 |
| 81. Piedmont Aviation, Inc. | 2,491,000 | 4,340,000 |
| 82. General Foods Corp. | 4,700,000 | 4,201,000 |
| 83. Anheuser-Busch, Inc. | 3,291,000 | 4,158,000 |
| 84. Hewlett-Packard Co. | 1,242,000 | 4,110,000 |
| 85. Timex Corp. | 2,637,000 | 3,901,000 |
| 86. Kimberly-Clark Corp. | 1,167,000 | 3,870,000 |
| 87. Brown-Forman Distillers Corp. | 4,572,000 | 3,841,000 |
| 88. Saab-Scania Of America, Inc. | 2,691,000 | 3,829,000 |
| 89. Princess Cruises Inc. | 4,587,000 | 3,801,000 |
| 90. Volvo of America Corp. | 3,154,000 | 3,767,000 |
| 91. Royal Viking Line | 3,454,000 | 3,761,000 |
| 92. Exxon Corp. | 3,387,000 | 3,443,000 |
| 93. Home Lines Cruises, Inc. | 3,143,000 | 3,374,000 |
| 94. Arthur S. DeMoss Foundation | —— | 3,366,000 |
| 95. Estée Lauder, Inc. | 2,685,000 | 3,307,000 |
| 96. Kellogg Co. | 2,696,000 | 3,257,000 |
| 97. Carnation Co. | 3,632,000 | 3,191,000 |
| 98. Ralston Purina Co. | 2,589,000 | 3,170,000 |
| 99. ITT Corporation | 3,038,000 | 3,162,000 |
| 100. Maytag Company, The | 4,107,000 | 3,150,000 |
| **Total top 100 newspaper advertisers** | | **$1,196,693,000** |

# Top brand spenders in national newspaper space

| | 1983 | 1982 | 1981 | 1980 | 1979 |
|---|---|---|---|---|---|
| **Airlines** | | | | | |
| Delta | $31,810,000 | $24,665,000 | $21,653,000 | $20,410,000 | $18,117,000 |
| Eastern | 22,461,000 | 21,625,000 | 23,670,000 | 20,161,000 | 12,568,000 |
| TWA | 21,852,000 | 19,776,000 | 17,354,000 | 17,440,000 | 11,005,000 |
| **Aluminum-paper products** | | | | | |
| Glad | 859,000 | 503,000 | 104,000 | 458,000 | 424,000 |
| Ziploc bags | 624,000 | 473,000 | 535,000 | 342,000 | 58,000 |
| Dixie products | 612,000 | 298,000 | 61,000 | 26,000 | 77,000 |
| **Amusements** | | | | | |
| Disney | 977,000 | 552,000 | 602,000 | 360,000 | 342,000 |
| 20th Century-Fox | 615,000 | 621,000 | 149,000 | 61,000 | 42,000 |
| Henry Ford Museum & Greenfield Village | 254,000 | 24,000 | 16,000 | — | — |
| **Auto lease-rental** | | | | | |
| Hertz | 8,429,000 | 4,682,000 | 5,053,000 | 4,550,000 | 4,366,000 |
| Avis | 3,655,000 | 2,245,000 | 3,609,000 | 1,320,000 | 2,481,000 |
| National | 2,215,000 | 1,230,000 | 1,097,000 | 1,173,000 | 1,230,000 |
| **Auto parts-accessories** | | | | | |
| Delco | 2,556,000 | 950,000 | 215,000 | 71,000 | 93,000 |
| Gabriel shocks | 890,000 | 1,028,000 | 678,000 | 82,000 | 225,000 |
| Sony car radio | 668,000 | 29,000 | — | 60,000 | — |
| **Automobiles** | | | | | |
| Ford | 28,967,000 | 28,015,000 | 28,820,000 | 15,199,000 | 21,777,000 |
| Cadillac | 22,780,000 | 16,752,000 | 13,522,000 | 9,621,000 | 10,862,000 |
| Chevrolet | 21,992,000 | 28,754,000 | 27,515,000 | 18,780,000 | 21,738,000 |
| **Bakery goods** | | | | | |
| Nabisco | 3,308,000 | 2,932,000 | 2,678,000 | 418,000 | 432,000 |
| Pepperidge Farm | 751,000 | 1,069,000 | 1,288,000 | 651,000 | 955,000 |
| Arnold | 541,000 | 217,000 | 176,000 | 276,000 | 284,000 |
| **Beers** | | | | | |
| Amstel Light | 2,697,000 | 1,464,000 | 10,000 | — | — |
| Budweiser | 2,242,000 | 1,929,000 | 939,000 | 258,000 | 214,000 |
| Miller | 1,556,000 | 490,000 | 173,000 | 98,000 | 49,000 |
| **Books** | | | | | |
| Times books | 2,684,000 | 963,000 | 144,000 | 558,000 | 747,000 |
| Doubleday | 2,147,000 | 1,693,000 | 1,542,000 | 1,280,000 | 1,538,000 |
| Literary Guild | 1,210,000 | 1,524,000 | 1,444,000 | 1,202,000 | 1,272,000 |
| **Bus lines** | | | | | |
| Greyhound | 5,824,000 | 1,209,000 | 908,000 | 838,000 | 526,000 |
| Trailways | 1,235,000 | 896,000 | 652,000 | 620,000 | — |
| Blue Bird Coach | 585,000 | 441,000 | 201,000 | 111,000 | 50,000 |

**Estimates prepared by Media Records in 125 markets representing 82% of U.S. total**

| | | | | | |
|---|---|---|---|---|---|
| **Cameras-photo supplies** | | | | | |
| Kodak | $ 5,105,000 | $ 3,650,000 | $ 2,401,000 | $ 3,180,000 | $ 1,975,000 |
| Polaroid | 1,923,000 | 1,388,000 | 2,267,000 | 900,000 | 2,420,000 |
| Clark Color | 1,803,000 | 1,904,000 | 1,203,000 | 898,000 | 559,000 |
| **Cereals** | | | | | |
| Kellogg's | 2,395,000 | 2,044,000 | 2,457,000 | 3,263,000 | 4,011,000 |
| General Mills | 1,746,000 | 420,000 | 457,000 | 335,000 | 314,000 |
| Post | 296,000 | 443,000 | 151,000 | 269,000 | 374,000 |
| **Cigarettes** | | | | | |
| Players | 23,945,000 | — | — | — | — |
| Bright | 21,980,000 | 19,194,000 | — | — | — |
| Century | 14,472,000 | — | — | — | — |
| **Coffees** | | | | | |
| Sanka | 895,000 | 655,000 | 508,000 | 946,000 | 809,000 |
| Nescafe | 820,000 | 668,000 | 593,000 | 634,000 | 1,396,000 |
| Maxwell House | 681,000 | 1,188,000 | 1,827,000 | 2,032,000 | 1,966,000 |
| **Condiments** | | | | | |
| Prego | 1,345,000 | 155,000 | 257,000 | 17,000 | — |
| Hunt's | 1,134,000 | 1,190,000 | 879,000 | 212,000 | 927,000 |
| Heinz | 904,000 | 758,000 | 677,000 | 551,000 | 1,105,000 |
| **Confectionery-snacks** | | | | | |
| M&M/Mars | 1,077,000 | 700,000 | 194,000 | 2,528,000 | 1,688,000 |
| Hershey | 1,066,000 | 911,000 | 1,233,000 | 264,000 | 358,000 |
| Mauna Loa Nuts | 470,000 | 456,000 | 272,000 | 43,000 | — |
| **Couponers** | | | | | |
| Vlassis Impact Inserts | 61,735,000 | 38,951,000 | 23,439,000 | 13,456,000 | 9,791,000 |
| Blair Inserts | 56,738,000 | 34,233,000 | 21,748,000 | 11,666,000 | 7,929,000 |
| Newspaper Coop Couponing (Market Corp. of America) | 36,230,000 | 40,751,000 | 3,546,000 | 2,677,000 | 2,139,000 |
| **Dairy products** | | | | | |
| Kraft | 1,125,000 | 1,841,000 | 1,221,000 | 1,119,000 | 694,000 |
| Sealtest | 1,086,000 | 493,000 | 709,000 | 365,000 | 297,000 |
| Coffee Mate | 657,000 | 327,000 | 590,000 | 62,000 | — |
| **Dental supplies** | | | | | |
| Crest | 889,000 | 47,000 | 124,000 | 12,000 | 728,000 |
| Colgate-Palmolive products | 536,000 | 151,000 | 1,617,000 | 324,000 | 377,000 |
| Reach toothbrush | 367,000 | 592,000 | 548,000 | 329,000 | 162,000 |
| **Farm & garden products** | | | | | |
| Snapper (McDonough/Fuqua) | 3,799,000 | 2,667,000 | 2,156,000 | 1,815,000 | 1,619,000 |
| Toro | 2,887,000 | 2,387,000 | 1,843,000 | 1,950,000 | 1,880,000 |
| Michigan Bulb | 2,357,000 | 2,640,000 | 2,068,000 | 2,024,000 | 1,407,000 |
| **Floor coverings** | | | | | |
| Armstrong | 959,000 | 1,640,000 | 1,290,000 | 698,000 | 1,294,000 |
| Congoleum | 653,000 | 495,000 | 78,000 | 372,000 | 130,000 |
| Lee's carpets | 377,000 | 428,000 | 330,000 | 639,000 | 646,000 |
| **Fruits-vegetables** | | | | | |
| Ore-Ida potatoes | 421,000 | 841,000 | 536,000 | 144,000 | 254,000 |
| Calif. Avocado Comm. | 402,000 | 205,000 | 25,000 | 27,000 | 103,000 |
| Birds Eye vegetables | 313,000 | 325,000 | 411,000 | 180,000 | 175,000 |

# Top brand spenders in newspaper space (cont.)

| | 1983 | 1982 | 1981 | 1980 | 1979 |
|---|---|---|---|---|---|
| **Gas-oil** | | | | | |
| Mobil | $ 6,475,000 | $ 7,226,000 | $ 8,105,000 | $ 5,631,000 | $ 5,61[illegible]000 |
| Texaco | 1,868,000 | 1,619,000 | 2,667,000 | 2,956,000 | 1,[illegible]43,000 |
| Exxon | 1,808,000 | 1,304,000 | 1,110,000 | 2,617,000 | 3,808,000 |
| **Heating-plumbing equipment** | | | | | |
| Kero-Sun heaters | 1,213,000 | 2,443,000 | 1,281,000 | 561,000 | 66,000 |
| Carrier | 763,000 | 1,093,000 | 460,000 | 242,000 | 345,000 |
| Amana | 309,000 | 90,000 | 139,000 | 24,000 | 24,000 |
| **Home building materials-tools** | | | | | |
| Shopsmith tools | 1,504,000 | 869,000 | 711,000 | 505,000 | 192,000 |
| Black & Decker tools | 721,000 | 387,000 | 811,000 | 739,000 | — |
| Armstrong ceilings | 580,000 | 35,000 | 93,000 | 909,000 | 948,330 |
| **Insurance—Life** | | | | | |
| Physicians Mutual | 1,705,000 | 1,657,000 | 1,184,000 | 841,000 | 719,000 |
| New York Life | 1,463,000 | 2,267,000 | 1,405,000 | 1,214,000 | 1,129,000 |
| Gerber Life | 1,244,000 | 761,000 | 451,000 | 1,199,000 | 1,140,000 |
| **Jewelry—Watches** | | | | | |
| Timex | 3,296,000 | 2,292,000 | 1,386,000 | 2,104,000 | 1,628,000 |
| Seiko | 1,252,000 | 1,299,000 | 1,698,000 | 632,000 | 93,000 |
| Rolex | 778,000 | 20,000 | 320,000 | — | — |
| **Jewelry—Other** | | | | | |
| Oneida silverware | 309,000 | 592,000 | 188,000 | 110,000 | 90,000 |
| Gorham silverware | 278,000 | — | — | — | — |
| Swank | 222,000 | 156,000 | 228,000 | 285,000 | 175,000 |
| **Liquors** | | | | | |
| Wild Turkey | 1,858,000 | 1,466,000 | 1,598,000 | 149,000 | 1,555,000 |
| Schenley | 1,804,000 | 1,306,000 | 868,000 | 569,000 | 442,000 |
| Seagrams | 1,516,000 | 3,418,000 | 2,395,000 | 4,397,000 | 3,324,000 |
| **Lotteries** | | | | | |
| Michigan State | 1,081,000 | 1,449,000 | 1,341,000 | 1,148,000 | 1,107,000 |
| New York State | 793,000 | 923,000 | 900,000 | 2,245,000 | 1,648,000 |
| Massachusetts State | 437,000 | 465,000 | 553,000 | 513,000 | 434,000 |
| **Magazines** | | | | | |
| TV Guide | 4,362,000 | 1,409,000 | 677,000 | 672,000 | 765,000 |
| Time | 1,803,000 | 2,256,000 | 2,442,000 | 2,034,000 | 1,826,000 |
| People | 921,000 | 1,090,000 | 672,000 | 386,000 | 594,000 |
| **Mail Order** | | | | | |
| Franklin Mint | 8,340,000 | 8,678,000 | 9,041,000 | 8,270,000 | 6,280,000 |
| Shopping Mart | 5,253,000 | 3,344,000 | 2,083,000 | 1,555,000 | 1,459,000 |
| Spencer Gifts | 4,118,000 | 3,728,000 | 3,426,000 | 6,477,000 | 5,880,000 |
| **Meats-fish-poultry** | | | | | |
| Hormel | 4,299,000 | 3,203,000 | 3,328,000 | 2,208,000 | 1,945,000 |
| Banquet | 1,440,000 | 354,000 | — | — | 78,000 |
| Wilson | 1,092,000 | 1,345,000 | 434,000 | 199,000 | 271,000 |

**Estimates prepared by Media Records in 125 markets representing 82% of U.S. total**

| | | | | | |
|---|---|---|---|---|---|
| **Motorcycles** | | | | | |
| Yamaha | $ 2,445,000 | $ 1,900,000 | $ 316,000 | $ 137,000 | $ 58,000 |
| Suzuki | 1,915,000 | 920,000 | 118,000 | — | 145,000 |
| Honda | 1,191,000 | 1,797,000 | 419,000 | 36,000 | 51,000 |
| **Office equipment** | | | | | |
| Texas Instruments | 16,857,000 | 3,260,000 | 1,094,000 | 1,065,000 | 150,000 |
| Xerox | 13,824,000 | 5,779,000 | 5,045,000 | 3,103,000 | 1,476,000 |
| IBM | 11,567,000 | 7,228,000 | 2,629,000 | 2,843,000 | 1,718,000 |
| **Paints** | | | | | |
| Sherwin Williams | 647,000 | 353,000 | 457,000 | 204,000 | 148,000 |
| Dutch Boy | 456,000 | 134,000 | 123,000 | 89,000 | 88,000 |
| Glidden | 394,000 | 342,000 | 720,000 | 389,000 | 297,000 |
| **Pet foods** | | | | | |
| Purina | 1,565,000 | 2,163,000 | 974,000 | 1,468,000 | 1,244,000 |
| Alpo | 776,000 | 247,000 | 116,000 | 233,000 | 20,000 |
| Kal Kan | 596,000 | 495,000 | 408,000 | 109,000 | 509,000 |
| **Phonographs-records-tapes** | | | | | |
| RCA | 8,723,000 | 6,996,000 | 5,480,000 | 265,000 | 1,365,000 |
| Columbia | 7,959,000 | 7,153,000 | 5,994,000 | 6,186,000 | 4,452,000 |
| Sony | 6,397,000 | 3,910,000 | 3,509,000 | 3,112,000 | 1,199,000 |
| **Prepared dishes** | | | | | |
| Jeno's Frozen Products | 508,000 | 128,796 | 153,000 | 227,000 | 242,000 |
| Boitoni Frozen Entrees | 300,000 | — | 19,000 | 137,000 | 137,000 |
| On-Cor Frozen Entrees | 299,000 | 95,000 | 38,000 | — | 29,000 |
| **Public utilities** | | | | | |
| AT&T | 23,610,000 | 4,426,000 | 1,280,000 | 2,336,000 | 1,225,000 |
| New York Telephone | 7,733,000 | 6,565,000 | 2,105,000 | 3,229,000 | 2,388,000 |
| Southwestern Bell | 5,284,000 | 4,274,000 | 2,494,000 | 2,693,000 | 1,405,000 |
| **Radio-tv sets** | | | | | |
| RCA | 3,936,000 | 2,991,000 | 3,587,000 | 3,175,000 | 2,422,000 |
| Zenith | 963,000 | 865,000 | 1,910,000 | 1,633,000 | 2,842,000 |
| G.E. | 461,000 | 816,000 | 450,000 | 183,000 | 214,000 |
| **Radio-tv stations** | | | | | |
| ABC | 10,228,000 | 10,241,000 | 10,240,000 | 11,808,000 | 10,891,000 |
| NBC | 7,816,000 | 11,383,000 | 13,727,000 | 15,488,000 | 12,839,000 |
| CBS | 6,695,000 | 8,424,000 | 8,658,000 | 7,870,000 | 8,388,000 |
| **Railroads** | | | | | |
| Amtrak | 5,979,000 | 5,358,000 | 3,741,000 | 2,115,000 | 3,942,000 |
| Burlington Northern | 550,000 | 407,000 | 389,000 | 1,147,000 | 385,000 |
| Southern Pacific | 454,000 | 15,254 | 56,000 | 29,000 | 82,000 |
| **Real estate** | | | | | |
| B. K. Haynes Corp. | 998,000 | 462,000 | 335,000 | 90,000 | — |
| Admiral Walk (Edgewater, NJ) | 738,000 | 536,000 | 31,000 | — | — |
| General Development Corp. | 654,000 | 245,000 | 590,000 | 489,000 | 226,000 |
| **Refrigerators-freezers** | | | | | |
| G.E. | 957,000 | 46,000 | 240,000 | 68,000 | 25,000 |
| Whirlpool | 203,000 | 165,000 | 205,000 | 268,000 | 288,000 |
| Frigidaire | 157,000 | — | — | 11,000 | — |

# Top brand spenders in newspaper space (cont.)

| | 1983 | 1982 | 1981 | 1980 | 1979 |
|---|---|---|---|---|---|
| **Soft drinks** | | | | | |
| Pepsi-Cola | $5,198,000 | $2,410,000 | $1,659,000 | $ 917,000 | $ 536,000 |
| Coca-Cola | 4,267,000 | 2,535,000 | 2,191,000 | 1,204,000 | 857,000 |
| Seven-Up | 1,760,000 | 684,000 | 1,087,000 | 1,993,000 | 2,409,000 |
| **Steamship lines** | | | | | |
| Holland American | 7,929,000 | 7,831,000 | 3,789,000 | 4,555,000 | 3,037,000 |
| Sitmar Cruises | 7,403,000 | 5,994,000 | 3,107,000 | 1,840,000 | 1,499,000 |
| Carnival Cruises | 6,876,000 | 3,194,000 | 1,042,000 | 237,000 | 115,000 |
| **Stoves-ranges-dishwashers** | | | | | |
| G.E. | 2,182,000 | 655,000 | 394,000 | 364,000 | 757,000 |
| Sharp Microwave Oven | 881,000 | 595,000 | 198,000 | 106,000 | 73,000 |
| Kitchen Aid | 766,000 | 1,012,000 | 1,041,000 | 406,000 | 732,000 |
| **Sugar substitutes** | | | | | |
| Equal | 724,000 | 282,000 | — | — | — |
| Sweet n' Low | 457,000 | 251,000 | 78,000 | 39,000 | — |
| Nutrasweet | 13,000 | — | — | — | — |
| **Tours-travel service** | | | | | |
| American Express | 7,226,000 | 8,557,000 | 5,059,000 | 2,168,000 | 2,020,000 |
| Liberty Travel Service | 5,356,000 | 3,853,000 | 3,312,000 | 2,155,000 | 2,618,000 |
| Pleasant Hawaiian | 5,572,000 | 2,334,000 | 1,183,000 | 1,507,000 | 625,000 |
| **Trucks-campers-vans** | | | | | |
| Datsun | 3,204,000 | 2,923,000 | 1,418,000 | 411,000 | 152,000 |
| Ford | 2,747,000 | 3,578,000 | 959,000 | 1,702,000 | 2,787,000 |
| Dodge | 2,637,000 | 1,792,000 | 1,290,000 | 730,000 | 1,159,000 |
| **Video games** | | | | | |
| Atari | 4,224,000 | 6,830,000 | 1,361,000 | 103,000 | 26,000 |
| Activision | 1,323,000 | 254,000 | — | — | — |
| Mattel Intellivision | 674,000 | 4,805,000 | 186,000 | — | — |
| **Vitamins-tonics-reducing aids** | | | | | |
| Nutrition Headquarters | 2,657,000 | 2,156,000 | 1,695,000 | 1,634,000 | 1,082,000 |
| Mannan Trim diet tablets | 1,614,000 | 416,000 | — | — | — |
| Nature Made vitamins | 1,117,000 | 587,000 | 723,000 | 484,000 | 202,000 |
| **Washers-dryers** | | | | | |
| G.E. | 543,000 | — | — | 71,000 | 73,000 |
| Whirlpool | 407,000 | 318,000 | 248,000 | 353,000 | 441,000 |
| Maytag | 98,000 | 23,000 | 111,000 | 89,000 | 259,000 |
| **Wearing apparel** | | | | | |
| Ralph Lauren | 2,174,000 | 1,747,000 | 843,000 | 304,000 | 437,000 |
| Hush Puppies | 1,876,000 | 1,290,000 | 1,636,000 | 964,000 | 789,000 |
| Maidenform | 1,816,000 | 867,000 | 482,000 | 1,342,000 | 1,435,000 |
| **Wines** | | | | | |
| Codorm IU | 649,000 | — | — | — | — |
| Freixenet | 643,000 | 70,000 | 18,000 | — | — |
| Incomparable Wines of France | 500,000 | 291,000 | 53,000 | 48,000 | — |

**Estimates prepared by Media Records in 125 markets representing 82% of U.S. total**

# NATIONAL ADVERTISING INVESTMENTS IN NEWSPAPERS IN 1983-1982

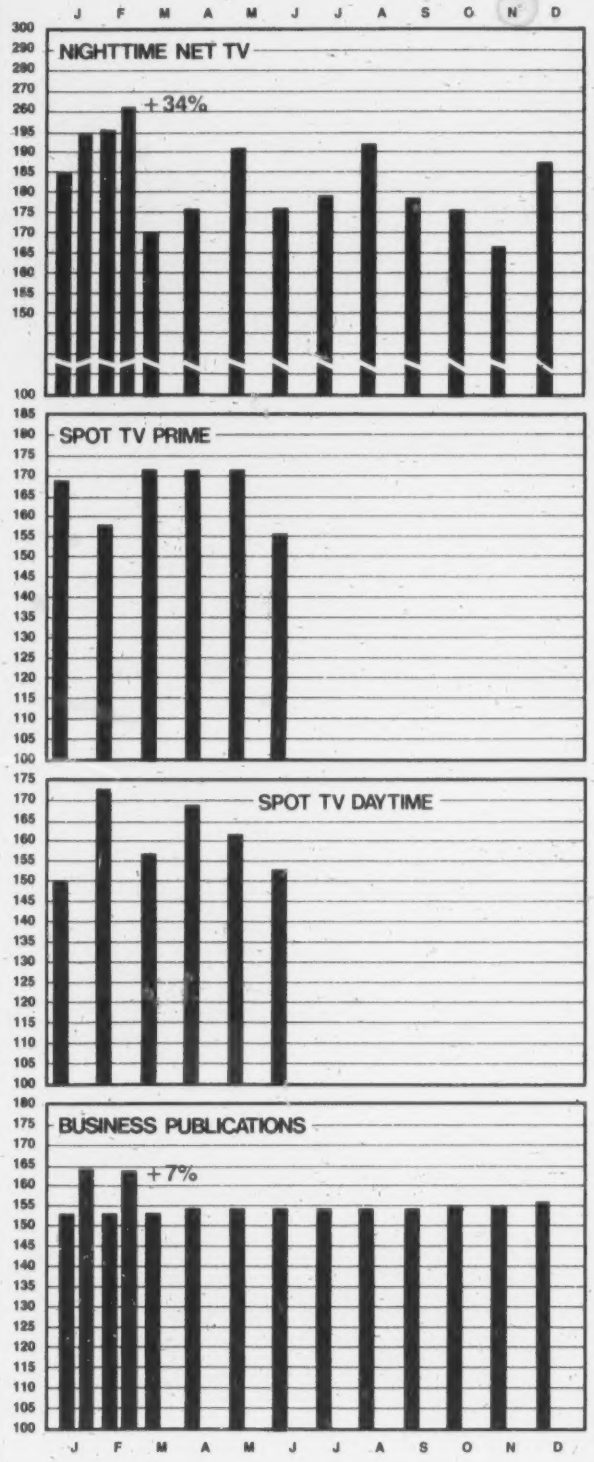
## Selected classifications, projected to U.S. totals by Media Records (© 1983)

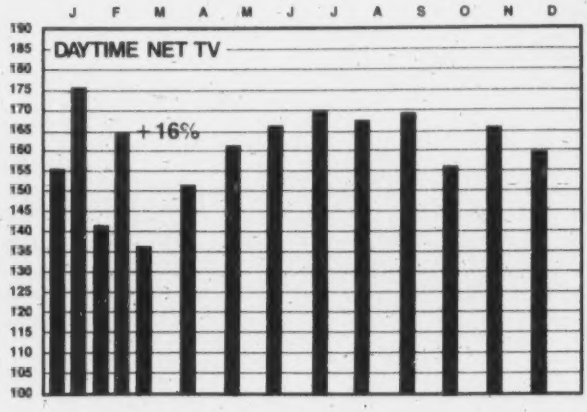
| Classification | 1983 | 1982 | Gain or loss |
|---|---|---|---|
| **GENERAL** | | | |
| **Alcoholic Beverages** | **$ 104,425,000** | **$ 98,981,000** | **+5.5%** |
| Beers | 19,720,000 | 15,605,000 | +26.4 |
| Wines | 9,728,000 | 8,022,000 | +21.3 |
| Liquors | 74,977,000 | 75,354,000 | −0.5 |
| **Automotive Total** | **$ 433,361,000** | **$ 403,969,000** | **+7.3** |
| Gasoline & Oil Companies | 18,770,000 | 22,975,000 | −18.3 |
| Leasing & Rentals | 50,115,000 | 36,601,000 | +36.9 |
| Parts, Accessories & Supplies | 13,326,000 | 11,303,000 | +17.9 |
| Passenger Cars (New) | 326,332,000 | 312,279,000 | +4.5 |
| Trucks, Trailers & Mobile Homes | 22,730,000 | 19,561,000 | +16.2 |
| Automotive Not Elsewhere Classified | 2,088,000 | 1,250,000 | +67.0 |
| **Farm & Garden** | **37,080,000** | **33,526,000** | **+10.6** |
| **Foods** | **187,098,000** | **183,070,000** | **+2.2** |
| Baby Foods | 359,000 | 519,000 | −30.8 |
| Bakery Goods | 15,045,000 | 14,555,000 | +3.4 |
| Baking Mixes, Flour & Ingredients | 2,265,000 | 2,031,000 | +11.5 |
| Beverages | 41,651,000 | 36,821,000 | +13.1 |
| Coffee | 4,709,000 | 6,865,000 | −31.4 |
| Tea | 1,939,000 | 1,490,000 | +30.1 |
| Fruit & Vegetable Juices | 8,023,000 | 8,562,000 | −6.3 |
| Soft Drinks — Carbonated — Diet | 5,173,000 | 1,536,000 | +236.8 |
| Soft Drinks — Carbonated — Non Diet | 16,902,000 | 13,697,000 | +23.4 |
| Miscellaneous Beverages | 4,905,000 | 4,671,000 | +5.0 |
| Cereals | 6,821,000 | 4,520,000 | +50.9 |
| Condiments | 9,731,000 | 10,142,000 | −4.1 |
| Confectionery & Snacks | 10,863,000 | 9,460,000 | +14.8 |
| Dairy Products | 22,881,000 | 19,391,000 | +18.0 |
| Desserts & Dessert Ingredients | 1,239,000 | 3,330,000 | −62.8 |
| Fruits & Vegetables | 7,041,000 | 9,030,000 | −22.0 |
| Macaroni Products — Uncooked | 1,837,000 | 1,647,000 | +11.5 |
| Meats, Fish & Poultry | 25,400,000 | 24,158,000 | +5.1 |
| Prepared Dinners & Dishes | 10,544,000 | 11,289,000 | −6.6 |
| Shortenings, Oil & Margarines | 10,488,000 | 12,296,000 | −14.7 |
| Soups | 1,195,794 | 2,143,000 | −44.2 |
| Sugars, Syrups & Jellies | 3,654,000 | 2,788,000 | +31.1 |
| Miscellaneous Foods | 16,084,000 | 18,950,000 | −15.1 |
| **Franchise Offers** | **9,011,000** | **6,159,000** | **+46.3** |
| **Help Wanted** | **66,298,000** | **46,149,000** | **+43.7** |
| **Hotels & Resorts** | **150,288,000** | **126,316,000** | **+19.0** |
| Hotels, Motels & Resorts | 104,072,000 | 87,017,000 | +19.6 |
| Resort Area Development | 46,216,000 | 39,299,000 | +17.6 |
| **Household Supplies** | **41,723,000** | **40,557,000** | **+2.9** |
| Aluminum & Paper Products | 7,120,000 | 7,085,000 | +0.5 |
| Disinfectants & Insecticides | 4,673,000 | 3,712,000 | +25.9 |
| Home Building Materials & Tools | 10,218,000 | 10,882,000 | −6.1 |
| Paints, Wall Coverings & Other Finishes | 4,367,000 | 5,312,000 | −17.8 |
| Soaps, Cleansers & Polishes | 10,187,000 | 8,429,000 | +20.9 |
| Miscellaneous Household Supplies | 5,158,000 | 5,137,000 | +0.4 |

| Classification | 1983 | 1982 | Gain or loss |
|---|---|---|---|
| **Household Equipment & Appliances** | **$ 77,017,000** | **$ 59,899,000** | **+28.6** |
| Air Conditioning | 5,016,000 | 5,209,000 | −3.7 |
| Phonographs, Records, Tapes & Recorders | 29,051,000 | 23,372,000 | +24.3 |
| Radio & TV Sets | 10,227,000 | 7,946,000 | +28.7 |
| Ranges, Stoves & Dishwashers | 6,292,000 | 7,183,000 | −12.4 |
| Refrigerators & Freezers | 2,475,000 | 444,000 | +457.4 |
| Small Electrical Appliances | 5,309,000 | 2,645,000 | +100.7 |
| Washers & Dryers | 2,152,000 | 772,000 | +178.8 |
| Misc. Household Equipment & Appliances | 16,495,000 | 12,328,000 | +33.8 |
| **Industrial** | **127,128,000** | **67,872,000** | **+87.3** |
| Aircraft & Equipment | 2,140,000 | 3,836,000 | −44.2 |
| Industrial Area Development | 3,913,000 | 3,239,000 | +20.8 |
| Office Equipment & Stationery Supplies | 96,576,000 | 40,510,000 | +138.4 |
| Industrial Materials & Machinery | 10,228,000 | 11,757,000 | −13.0 |
| Miscellaneous Industrial | 14,271,000 | 8,530,000 | +67.3 |
| **Insurance** | **47,220,000** | **45,845,000** | **+3.0** |
| Life, Health & Medical | 40,553,000 | 40,311,000 | +0.6 |
| Fire, Casualty & Other | 6,667,000 | 5,534,000 | +20.5 |
| **Jewelry, Watches & Silverware** | **9,608,000** | **7,686,000** | **+25.0** |
| **Mail Order** | **64,464,000** | **70,607,000** | **−8.7** |
| **Medical Products & Drugs** | **33,710,000** | **26,135,000** | **+29.0** |
| Cold, Cough & Sinus Remedies | 5,116,000 | 2,039,000 | +150.9 |
| Digestive Aids & Laxatives | 1,101,000 | 494,000 | +122.9 |
| Headache Remedies & Sedatives | 1,302,000 | 2,723,000 | −52.2 |
| Vitamins, Tonics & Reducing Aids | 19,789,000 | 13,308,000 | +48.7 |
| Medicated Skin Products | 1,412,000 | 1,900,000 | −25.7 |
| Miscellaneous Medical Products & Drugs | 4,990,000 | 5,671,000 | −12.0 |
| **Public Service Utilities & Communications** | **135,731,000** | **68,585,000** | **+97.9** |
| **Publishing & Media** | **209,147,000** | **211,687,000** | **−1.2** |
| Books | 33,042,000 | 32,077,000 | +3.0 |
| Magazines | 27,954,000 | 22,175,000 | +26.1 |
| Newspapers | 7,166,000 | 3,857,000 | +85.8 |
| Radio & TV Stations | 140,985,000 | 153,578,000 | −8.2 |
| **Tobacco** | **256,766,000** | **315,991,000** | **−18.7** |
| Cigars | 964,000 | 865,000 | +11.4 |
| Cigarettes | 251,932,000 | 313,738,000 | −19.7 |
| Tobacco & Smoking Accessories | 3,870,000 | 1,388,000 | +178.8 |
| **Toiletries & Toilet Goods** | **35,740,000** | **33,426,000** | **+6.9** |
| **Transportation** | **470,363,000** | **420,570,000** | **+11.8** |
| Airlines | 247,747,000 | 239,347,000 | +3.5 |
| Domestic | 144,707,000 | 154,932,000 | −6.6 |
| International | 99,872,000 | 80,542,000 | +24.0 |
| Cargo | 3,168,000 | 3,873,000 | −18.2 |
| Bus Lines | 10,817,000 | 5,720,000 | +89.1 |
| Railroads | 8,856,000 | 7,943,000 | +11.5 |
| Steamships | 76,681,000 | 63,636,000 | +20.5 |
| Tours & Travel Service | 120,859,000 | 96,533,000 | +25.2 |
| Miscellaneous Transportation | 5,403,000 | 7,391,000 | −26.9 |

# MEDIA COST INDEX

Black bars index for 1983; color bars 1984; base year 1977




**As expected, the Winter Olympics** had its effect on **network tv prime time** costs. How much? While individual buys could vary in extent of increase, the entire prime time spectrum came in at 34% above the level of February '83. A quick look at the March data indicates that things are more normal — a month-over-month increase of about 10%.

**Daytime network tv** registered a 16% increase for February in the month-over-month comparison. This was a rise of four points over the January level.

For the second month running, **network radio** came in below its 1983 levels — off 1% in February, following a 5% decline in January.

The spread among the print media ranges from +7% to +22%, with most of the components showing no change from January.

The exception is **consumer magazines** which report a 9% increase, following 8% in January.

The other print media show increases as follows: **outdoor** — +10%; **newspapers** — +9%; **national supplements** — +22%, and **business publications** — +7%.

The spot broadcast media remain unreported, but there are a couple of champions in the wings hoping to do battle.

**The Media Cost Index** reflects trends extracted from available sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled.

Sources: **Nighttime Network TV** — Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service. **Daytime Network TV** — Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service. **Network Radio** — Cost per average 30-second radio announcement from BAR's Network Radio Service. **Spot TV — prime and daytime** — Cost per 30-second spot, Monday-Sunday from BAR's Spot TV Service.

Consumer Magazine estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn. **National supplements** estimate based on published (rate cards) costs of a page, four-color for the national supplements. **Daily Newspapers** estimate based on Newspaper Advertising Bureau report of SRDS costs per agate line of a sample of 788 newspapers weighted to represent the universe. **Business Publications** estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications. **Outdoor Posters** based on estimate prepared by Institute of Outdoor Advertising. Spot Radio data to develop a continuing index are not available at the present.

**How to read: Media Cost Index** reflects latest available costs compared with base year 1977. Percent change shows rate of change from the same month in previous year.

# MEDIA COST INDEX (continued)

Black bars index for 1983; color bars 1984; base year 1977